

State of California

## MEMORANDUM

**To:** FAIR POLITICAL PRACTICE COMMISSION **Date:** March 22, 2007  
428 J Street, Suite 620  
Sacramento, CA 95814

**From:** AUGUSTIN R. JIMENEZ  
Special Counsel  
Business, Transportation and Housing Agency  
980 9th Street, Suite 2450  
Sacramento, CA 95814-2719

**Subject:** ASSUMING OFFICE STATEMENT OF  
AGENCY SECRETARY DALE E. BONNER

Pursuant to the Conflict of Interest Code of the Business, Transportation and Housing Agency (BT&H Agency) (21 California Code of Regulations § 7000), attached hereto is the original Statement of Economic Interests (Form 700) – Assuming Office Statement – of BT&H Agency Secretary, Dale E. Bonner, Esq. Secretary Bonner assumed office on March 7, 2007.

Please feel free to contact me at 327-2820 if you have any questions.

Attachment:

cc: All copies forwarded w/ attchmt.:  
Dale E. Bonner, Secretary  
Cynthia Rasberry, CHP, Administrative Filing Officer for BT&H Agency  
California Coastal Commission  
California Fiscal Recovery Financing Authority  
California Housing Finance Agency  
Grand Avenue Joint Powers Authority Board of Directors  
Managed Risk Medical Insurance Board  
San Francisco Bay Conservation and Development Board  
Technology Services Board  
California Infrastructure and Economic Development Bank  
BT&H Agency File ✓

**STATEMENT OF ECONOMIC INTERESTS**  
**COVER PAGE**

Date Received  
Official Use Only

*A Public Document*

Please type or print in ink

NAME (LAST)	(FIRST)	(MIDDLE)	DAYTIME TELEPHONE NUMBER
Bonner	Dale	E.	[REDACTED]
MAILING ADDRESS (May use business address)	STREET	CITY	STATE ZIP CODE OPTIONAL: FAX / E-MAIL ADDRESS
[REDACTED]			

**1. Office, Agency, or Court**

Name of Office, Agency, or Court:  
Business, Transportation and Housing Agency

Division, Board, District, if applicable:

Your Position:  
Secretary

→ If filing for multiple positions, list additional agency(ies)/ position(s): (Attach a separate sheet if necessary.)

Agency: See attached.

Position: \_\_\_\_\_

**2. Jurisdiction of Office (Check at least one box)**

- ☒ State
- ☐ County of \_\_\_\_\_
- ☐ City of \_\_\_\_\_
- ☐ Multi-County \_\_\_\_\_
- ☐ Other \_\_\_\_\_

**3. Type of Statement (Check at least one box)**

- ☒ Assuming Office/Initial Date: 03 / 07 / 07
- ☐ Annual: The period covered is January 1, 2006, through December 31, 2006.
- or-
- ☐ The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_, through December 31, 2006.
- ☐ Leaving Office Date Left: \_\_\_\_/\_\_\_\_/\_\_\_\_ (Check one)
- ☐ The period covered is January 1, 2006, through the date of leaving office.
- or-
- ☐ The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_, through the date of leaving office.
- ☐ Candidate

**4. Schedule Summary**

- Total number of pages including this cover page: 5
- Check applicable schedules or "No reportable interests."
- I have disclosed interests on one or more of the attached schedules:
- Schedule A-1 ☒ Yes – schedule attached  
*Investments (Less than 10% Ownership)*
- Schedule A-2 ☐ Yes – schedule attached  
*Investments (10% or greater Ownership)*
- Schedule B ☐ Yes – schedule attached  
*Real Property*
- Schedule C ☒ Yes – schedule attached  
*Income, Loans, & Business Positions (Income Other than Gifts and Travel Payments)*
- Schedule D ☐ Yes – schedule attached  
*Income – Gifts*
- Schedule E ☐ Yes – schedule attached  
*Income – Travel Payments*
- or-
- ☐ No reportable interests on any schedule

**5. Verification**

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed March 21, 2007

Signature

**Secretary of the Business, Transportation and Housing Agency  
Commissions, Boards and other State Agencies**

**California Coastal Commission**

Melanie Wong  
45 Fremont Street, Suite 1900  
San Francisco, California 94105-2219

**California Fiscal Recovery Financing Authority**

Department of Justice  
Ms. Molly Arnold  
1300 I Street, Suite 125  
P. O. Box 944255  
Sacramento, California 94244-2550

**California Housing Finance Agency**

Ms. JoJo Ojima  
1415 "L" Street, Suite 500  
Sacramento, California 95814

**Grand Avenue Joint Powers Authority Board of  
Directors**

Ms. Karen A. Lichtenberg  
County of Los Angeles  
648 Kenneth Hahn Hall of Administration  
500 West Temple Street  
Los Angeles, California 90012-2713

**Managed Risk Medical Insurance Board**

Ms. Laura Rosenthal  
1000 G Street, Suite 450  
Sacramento, California 95814

**San Francisco Bay Conservation and  
Development Board**

Ms. Ellen Sampson  
50 California Street, Suite 2600  
San Francisco, California 94111

**Technology Services Board**

Ms. Betty Hickerson  
P. O. Box 1810  
Rancho Cordova, California 95741-1810

**California Infrastructure and Economic  
Development Bank**

1001 "T" Street, 19<sup>th</sup> Floor  
Sacramento, California 95814

**SCHEDULE A-1****Investments****Stocks, Bonds, and Other Interests**

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name

Bonner, Dale E.

> NAME OF BUSINESS ENTITY  
Epstein Becker & Green, P.C.

GENERAL DESCRIPTION OF BUSINESS ACTIVITY  
Law Firm

FAIR MARKET VALUE  
☐ \$2,000 - \$10,000 ☒ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT  
☒ Stock  
☐ Other \_\_\_\_\_  
(Describe)

IF APPLICABLE, LIST DATE:  
\_\_\_\_/\_\_\_\_/06      \_\_\_\_/\_\_\_\_/06  
ACQUIRED      DISPOSED

> NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE  
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT  
☐ Stock  
☐ Other \_\_\_\_\_  
(Describe)

IF APPLICABLE, LIST DATE:  
\_\_\_\_/\_\_\_\_/06      \_\_\_\_/\_\_\_\_/06  
ACQUIRED      DISPOSED

> NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE  
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT  
☐ Stock  
☐ Other \_\_\_\_\_  
(Describe)

IF APPLICABLE, LIST DATE:  
\_\_\_\_/\_\_\_\_/06      \_\_\_\_/\_\_\_\_/06  
ACQUIRED      DISPOSED

> NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE  
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT  
☐ Stock  
☐ Other \_\_\_\_\_  
(Describe)

IF APPLICABLE, LIST DATE:  
\_\_\_\_/\_\_\_\_/06      \_\_\_\_/\_\_\_\_/06  
ACQUIRED      DISPOSED

> NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE  
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT  
☐ Stock  
☐ Other \_\_\_\_\_  
(Describe)

IF APPLICABLE, LIST DATE:  
\_\_\_\_/\_\_\_\_/06      \_\_\_\_/\_\_\_\_/06  
ACQUIRED      DISPOSED

> NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE  
☐ \$2,000 - \$10,000 ☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000 ☐ Over \$1,000,000

NATURE OF INVESTMENT  
☐ Stock  
☐ Other \_\_\_\_\_  
(Describe)

IF APPLICABLE, LIST DATE:  
\_\_\_\_/\_\_\_\_/06      \_\_\_\_/\_\_\_\_/06  
ACQUIRED      DISPOSED

Comments: \_\_\_\_\_

**SCHEDULE C**  
**Income, Loans & Business**  
**Positions**  
(Other than Gifts and Travel Payments)

<b>CALIFORNIA FORM 700</b> FAIR POLITICAL PRACTICES COMMISSION
Name Bonner, Dale E.

1. INCOME RECEIVED	1. INCOME RECEIVED
NAME OF SOURCE OF INCOME Epstein Becker & Green, P.C.	NAME OF SOURCE OF INCOME Epstein Becker & Green, P.C.
ADDRESS 1875 Century Park E., #500, Los Angeles, CA 90067	ADDRESS 1875 Century Park E., #500, Los Angeles, CA 90067
BUSINESS ACTIVITY, IF ANY, OF SOURCE Law Firm	BUSINESS ACTIVITY, IF ANY, OF SOURCE Law Firm
YOUR BUSINESS POSITION Attorney (Shareholder)	YOUR BUSINESS POSITION Attorney (Shareholder)
GROSS INCOME RECEIVED <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input checked="" type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input checked="" type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input checked="" type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income <input type="checkbox"/> Loan repayment <input type="checkbox"/> Sale of _____ <span style="margin-left: 150px;"><i>(Property, car, boat, etc.)</i></span> <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ <input type="checkbox"/> Other _____ <span style="margin-left: 150px;"><i>(Describe)</i></span>	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income <input type="checkbox"/> Loan repayment <input checked="" type="checkbox"/> Sale of <u>Shareholder Interest</u> <span style="margin-left: 150px;"><i>(Property, car, boat, etc.)</i></span> <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ <input type="checkbox"/> Other _____ <span style="margin-left: 150px;"><i>(Describe)</i></span>

2. LOAN RECEIVED	
* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:	
NAME OF LENDER _____ ADDRESS _____ BUSINESS ACTIVITY, IF ANY, OF LENDER _____ HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	INTEREST RATE _____% <input type="checkbox"/> None SECURITY FOR LOAN <input type="checkbox"/> None <input type="checkbox"/> Personal residence <input type="checkbox"/> Real Property _____ <span style="margin-left: 150px;"><i>Street address</i></span> _____ <span style="margin-left: 150px;"><i>City</i></span> <input type="checkbox"/> Guarantor _____ <input type="checkbox"/> Other _____ <span style="margin-left: 150px;"><i>(Describe)</i></span>

Comments: \_\_\_\_\_

**SCHEDULE C**  
**Income, Loans & Business**  
**Positions**  
(Other than Gifts and Travel Payments)

<b>CALIFORNIA FORM 700</b> <b>FAIR POLITICAL PRACTICES COMMISSION</b>
Name Bonner, Dale E.

1. INCOME RECEIVED	1. INCOME RECEIVED
NAME OF SOURCE OF INCOME James Irvine Foundation	NAME OF SOURCE OF INCOME Keenan and Associates
ADDRESS 865 S. Figueroa, #2308, Los Angeles, CA 90017	ADDRESS 2355 Crenshaw Blvd., #200, Torrance, CA 90501
BUSINESS ACTIVITY, IF ANY, OF SOURCE Non-Profit Philanthropy	BUSINESS ACTIVITY, IF ANY, OF SOURCE Health Insurance Brokerage
YOUR BUSINESS POSITION Leadership Award Committee - Volunteer	YOUR BUSINESS POSITION Advisory Committee Member
GROSS INCOME RECEIVED <input type="checkbox"/> \$500 - \$1,000 <input checked="" type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	GROSS INCOME RECEIVED <input checked="" type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income <input type="checkbox"/> Loan repayment <input type="checkbox"/> Sale of _____ <i>(Property, car, boat, etc.)</i> <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more	CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's or registered domestic partner's income <input type="checkbox"/> Loan repayment <input type="checkbox"/> Sale of _____ <i>(Property, car, boat, etc.)</i> <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more
<input checked="" type="checkbox"/> Other Per Diem for Committee Meeting(s) <i>(Describe)</i>	<input checked="" type="checkbox"/> Other Per Diem for Committee Meeting(s) <i>(Describe)</i>

**2. LOAN RECEIVED**

\* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
ADDRESS	_____% <input type="checkbox"/> None	_____
BUSINESS ACTIVITY, IF ANY, OF LENDER	SECURITY FOR LOAN	
HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$500 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> OVER \$100,000	<input type="checkbox"/> None <input type="checkbox"/> Personal residence <input type="checkbox"/> Real Property _____ <i>Street address</i> _____ <i>City</i> <input type="checkbox"/> Guarantor _____ <input type="checkbox"/> Other _____ <i>(Describe)</i>	

Comments: \_\_\_\_\_